Record keeping – Quality improvement guide

| Policies & Procedures | Staff Identification | Training | User Accountability | Risk Assessment |
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| * Develop and implement policies and procedures that provide clear steps and can be effectively maintained. * Use forms or checklists to help staff complete record keeping tasks. * Computer security. * Review and modify your policies and procedures regularly. | * Allocate the appropriate resources (staff and physical) needed to maintain records. * Nominate a practice champion to oversee internal audits. * Delegate responsibility for monitoring administrative record keeping practices. | * Keep a record when staff are trained and what they attended. * Regularly hold training sessions for any updates to policies and procedures. * Keep current by seeking advice from professional peak bodies or training institutions. | * Make sure information is collected and stored in a consistent way and all staff follow the same policies and procedures. * Monitor security and access of patient records. * Review and update user access to computer systems on a regular basis. | * Know your responsibilities. * Know where to get support * Review your policies and procedures regularly and invite your staff to provide feedback. |
| Tips | | | | |
| Complete the [administrative record keeping](https://www.health.gov.au/resources/publications/medicare-administrative-record-keeping-checklist) and [electronic administrative record keeping](https://www.health.gov.au/resources/publications/medicare-electronic-administrative-record-keeping) checklists to evaluate and review your current processes and procedures.  Use the [Medicare billing assurance](https://www.health.gov.au/resources/publications/medicare-billing-assurance-toolkit-strategies-to-minimise-risk) and [Medicare billing assurance charter](https://www.health.gov.au/resources/publications/medicare-billing-assurance-charter) templates to set out the principles and procedures that support your practice’s billing activities under Medicare. | Select a staff member who will enjoy the challenge, accept responsibility and remain accountable.  Challenge your staff to come up with finding new ways to achieve results. | Make sure staff:  **Know their responsibilities** – what to record, how to maintain records and how long they should be kept.  **Know where to get support** – [AskMBS](https://www.health.gov.au/contacts/askmbs-email-advice-service) responds to enquiries about services listed on the Medicare Benefits Schedule and advice on interpretation of MBS items explanatory notes and associated legislation. | Allocate the appropriate resources needed to maintain your records, for example, staff and physical resources. You may choose to make the [Administrative Record Keeping Guidelines](https://www.health.gov.au/resources/publications/administrative-record-keeping-guidelines-for-health-professionals) a part of the range of record keeping guidance tools that you have available for staff in your practice. | Conduct your own quarterly audit. Review 10 records at random from each GP in your practice for specific qualities such as clarity, timeliness and consistency.  The [Health professional guidelines](https://www.health.gov.au/resources/collections/health-professional-guidelines) help you to understand what documents can be used to substantiate services if you are asked to participate in a compliance audit or review. |